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ABSTRACT

The purpose of this study was to gather information on what the role of university presidential spouses should be as reported by spouses and chairs of boards of trustees at member institutions of the Association of American Universities (AAU). Data were gathered from a survey that was mailed to spouses and trustees during the summer of 1989. At that time, AAU's membership included 55 institution presidents with spouses of whom 85.5 percent returned the survey. Trustee response rate was 57.6 percent. Results revealed two major patterns of response: (1) according to both spouses and trustees, the role of the spouse should be discussed informally among the board, the spouse, and the presidential candidate during the presidential interview process, with the spouse actively participating in defining the role; (2) the response patterns support the concept that the spouse's involvement with the university should be either as a volunteer or as an employee. Response patterns of spouses from both private and public universities and the response patterns of trustees from public institutions tended to support both types of involvement, while the response patterns of trustees from private universities tended to categorize the role as that of a volunteer. The survey itself is appended. (Includes 7 references) (Author/JB)

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THE ROLE OF THE UNIVERSITY PRESIDENTIAL SPOUSE AS PERCEIVED BY SPOUSES AND CHAIRS OF BOARDS OF TRUSTEES AT ASSOCIATION OF AMERICAN UNIVERSITIES AFFILIATED INSTITUTIONS

EXECUTIVE SUMMARY

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UNIVERSITY OF ILLINOIS
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1991

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ABSTRACT

This study was designed to gather information on what the role of university presidential spouses should be as reported by spouses and chairs of boards of trustees at member institutions of the Association of American Universities (AAU). The five objectives of this study were: (a) to determine to what extent spouses should be included in the presidential interview process, (b) to identify which activities should be required of spouses, (c) to determine whether the spouse should play an active role vis-a-vis the university, (d) to ascertain the amount of institutional support and the types of benefits that should be provided to spouses, and (e) to determine congruency or incongruency between the responses from spouses and those from board chairs.

There were three unique features of this study. First, in addition to a survey of presidential spouses, chairs of boards of trustees were asked to complete a questionnaire. Second, respondents were asked to define what the role should be rather than to describe the role as it existed. Third, the population for this study was a relatively small and homogeneous group of institutions that share some common characteristics, including complexity of mission, which would present more uniform circumstances, opportunities, and expectations for presidential spouses.

The data were gathered from a survey that was mailed to spouses and trustees during the summer of 1989. At that time, AAU's membership included 30 public and 29 private institutions. When the survey was conducted, 55 of the presidents of these 59 institutions had spouses.

Among spouses, 85.5% (47) returned the survey. The response rate for trustees was 57.6% (34). Responses were received from both the spouse and the trustee at 31 institutions.

Survey results revealed two major patterns of response. First, according to both spouses and trustees, the role of the spouse should be discussed informally among the board, the spouse, and the presidential candidate during the presidential interview process, with the spouse actively participating in defining the role. Second, the response patterns support the concept that the spouse's involvement with the university should be either as a volunteer or as an employee. The response patterns of spouses from both private and public universities and the response patterns of trustees from public institutions tended to support both types of involvement, while the response patterns of trustees from private universities tended to categorize the role as that of a volunteer.

NOTE

This report is a summary of a 1990 Ph.D. dissertation entitled: The Role of the University Presidential Spouse as Perceived by Spouses and Chairs of Boards of Trustees at Association of American Universities Affiliated Institutions.

Among others, the original dissertation was dedicated to: The spouses, presidents, and chairs of boards of trustees at institutions affiliated with the Association of American Universities, who made this project a reality; and to Judith L. Ikenberry and Adele R. Rosenzweig for sharing their knowledge with me.

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INTRODUCTION

The role of the American college and university president has been written about and defined since the early days of the twentieth century. Until recently, however, the role of the presidential spouse has been neglected; it has been neither adequately defined nor fully discussed. For decades spouses followed the patterns established by their predecessors. As the women's movement gained recognition in the 1970s, the first systematic studies of spouses were conducted, and a body of literature began to develop.

Most authors on this topic point to Marguerite Walker Corbally's research and subsequent book, The Partners (1977), as the first major study undertaken to define and understand the role of the spouse. In the foreword of her book, Corbally underscored the need for a better definition of the role of the presidential spouse:

> The need for this book began to be apparent to me when my husband was appointed president of a large private university. Having spent most of our adult years involved in the life of one campus or another in various capacities, we thought we were prepared for our new responsibilities, but events soon proved us wrong. Not only did we still have much to learn, but there also seemed to be no one to whom we could turn and virtually no literature we could consult which would help us understand and develop my role in the new venture. (p. v)

In 1974 the American Association of State Colleges and Universities (AASCU) developed a conference program for spouses of the heads of its member institutions in order to discuss the challenges facing spouses. Over the years, the program grew from informal sessions to structured programs held in conjunction with the annual meeting of AASCU. In 1981, under the direction of Roberta Ostar, spouse of the president of AASCU, Allan W. Ostar, a survey was sent to 314 presidential spouses. This survey, as well as subsequent surveys conducted in 1983 and 1986, sought to describe the role of the spouse.

While AASCU was engaged in offering conference programs and conducting studies, another professional association, the National Association of State Universities and Land-Grant Colleges (NASULGC), created its own Committee of President's/Chancellor's Spouses in 1981. Subsequently, in 1983, spouses of the heads of 138 member institutions received a survey designed to develop a profile of presidential spouses.

PURPOSE OF THE STUDY

The results from each of the five previous studies led to the recommendation that boards of trustees should be more direct in defining and communicating their expectations of the role of the presidential spouse. The questions that arise out of these studies are: Are the boards willing to involve the spouse in the presidential interview process? Do hiring boards agree with the role as defined by presidential spouses? What activities should be required of the president's spouse? What benefits and support are boards prepared to offer to the spouse? These questions are important because the expectation that a spouse will play an active role can be a considerable factor in the decision of a presidential candidate to accept an offer, especially if the candidate's spouse has her/his own career, if there are family needs that must be met by the spouse, or if the spouse has no desire to assume an active role in the life of the campus.

The specific objectives of this study were:

1. to determine to what extent spouses should be included in the presidential interview process;

2. to determine whether the spouse should play an active role and thus be treated as an employee of the institution;

3. to identify which activities should be "optional," "expected," or "required" of presidential spouses;

4. to ascertain the amount of institutional support and the types of benefits that should be provided to spouses; and

5. to determine congruency or incongruency between the responses from spouses and those from board chairs.

METHODOLOGY

The sample was the 59 member institutions of the Association of American Universities (AAU). This organization was selected because it provided a rather homogeneous group of universities that shared a somewhat common mission since each had "strong programs of graduate and professional education and research" (AAU, 1988). It was assumed that this group of institutions, which shared some common characteristics, including complexity of mission, would present more uniform circumstances, opportunities, and expectations for presidential spouses.

At the time this study was conducted, AAU membership included 30 public and 29 private universities. Two of the universities were located in Canada, while the rest were located in the United States. Also, 55 of the presidents of these institutions had spouses, one was a member of a religious order, two were divorced, and one was a widower.

A questionnaire (Appendix) and cover letter were mailed to the 55 presidential spouses on June 1, 1989. A letter also was sent to the presidents of AAU institutions asking them to do two things. First, each was asked to forward a copy of a cover letter and survey to the chair of her/his board of trustees. Second, each was requested to complete and return a post card that asked for the name and address of the chair in order that follow-up mailings could be sent directly to her/him. All 59 presidents were sent the mailing regardless of whether they had spouses, since trustees were being asked to complete the survey and the marital status of future presidents might be different. A second mailing was sent in mid-July of 1989 to those spouses, presidents, and trustees who had not responded to the first mailing.

The questionnaire sent to spouses was identical to the one sent to trustees with the exception that the background information section asked for information that was relevant to each group. The basic instrument contained 19 questions, which were were divided into the following four sections:

Section A. The Presidential Search Process as It Relates to the Spouse: The questions in this section focused on the presidential search process and asked whether the spouse should be included in the interview process and, if so, how she/he should be accommodated.

Section B. Activities of the President's Spouse: This section asked respondents to indicate which activities should be optional, expected, or required of the president's spouse.

Section C. Role of the President's Spouse: Items in this section focused on whether the spouse should play an active role in support of the president and institution. Included in this section were other questions that related to whether an active spouse should receive a salary and title and whether a spouse's work should be supervised and evaluated. It also asked what the board would most likely consider to be the three most important responsibilities of the spouse of the president.

Section D. Institutional Support for the Spouse of the President: This section focused on the types of support and benefits the institution should provide to the spouse.

The background section for spouses asked for information related to the current situation of the spouse. Among other things, it sought data on whether the spouse had been included in the interview process, how many hours were spent each week in support of the president and institution, whether the spouse received a salary, and whether the spouse had a career for which she/he received a salary.

The background section on the trustee's questionnaire asked, among other things, when the trustee was named to the board and when she/he was selected/elected chair, and whether the trustee was familiar with the presidential search process.

The instrument was designed to be completed in 45 minutes. While most of the questions required yes/no, multiple choice, or scaled responses, open-ended questions were included in order to permit the respondent to explain her/his short answers to questions. Descriptive statistics were used to report the findings. Frequency distributions were calculated based on the number of respondents who answered each item on the survey. In the case where a trustee of a board represented multiple institutions within AAU, her/his response was credited to each institution.

Definitions

Several terms with special significance are used throughout the study. They are:

President: Chief executive officer of an individual university or a university system.

Board of Trustees: The governing board of an institution with a single campus or an institution with multiple campuses.

Chair of the Board: The person who heads the board.

Role of the Spouse: The part played by the spouse in support of the president and the institution, including the specific university or university-related activities in which she/he should be engaged, as well as responsibilities and assignments.

Benefits: Compensation and perquisites that are provided to the spouse for services rendered. These may include: salary, insurance, contributions to a retirement fund, library card, free tuition, travel funds, car, clothing allowance, etc.

Official Residence: A domicile provided by the institution for the president and her/his family.

Private Institution: An "institution sponsored and financed under private auspices, rather than by a governmental body" (Hawes & Hawes, 1982, p. 175).

Public Institution: An "institution of education provided by a governmental body" (Hawes & Hawes, 1982, p. 180).

Trustee: The chair of the board of trustees who completed the survey.

Assumptions

When this study was conceived it was assumed that most of the presidents of the member institutions of AAU were males and were married. A second assumption was that the person responding for the board of trustees was knowledgeable about the perceptions of the board related to the

role of the presidential spouse. It also was assumed that the person who completed the survey on behalf of the board was familiar with the presidential search process used by her/his university.

A final assumption was that all spouses and trustees would abide by the instructions not to consult with each other as they completed the questionnaire. This was requested so that responses would not be biased.

Limitations of the Study

This study focused on institutions that share a relatively common mission. Therefore, comparisons with other studies will be limited.

In some cases, the questionnaire was sent to the spouse of the head of a university system. This occurred because membership in AAU included both system heads and heads of campuses.

A further limitation of the study was that the chair of the board of trustees presented her/his opinion of the board of trustees' perspective. Therefore, the perceptions given may not be unanimously held by the entire board for a particular institution.

FINDINGS

Among spouses from private institutions, 71.6% (20) completed the survey, while 100% (27) of the spouses from public universities responded. The overall response rate for spouses was 85.5% (47). Among trustees from private institutions, 44.8% (13) responded, while 70.0% (21) of the trustees from public universities completed and returned the survey. The overall response rate for trustees was 57.6% (34). Responses were received from both the spouse and trustee at 31 institutions. This represents 66.0% of the spouses who responded and 91.2% of the trustees who completed the survey.

One spouse summed up the feeling of several respondents who found it difficult to write about what a presidential spouse's role "should be" by noting that it was not "easy" to fill out the survey because it required her to "sort out [her] thinking on this subject." In many instances, respondents added comments to their responses. One of the difficulties in defining the role of the spouse is that there are gender issues to be considered. One spouse noted:

> A predominantly male board and faculty (the present situation in higher education) would have few if any expectations of the male spouse of a female university president. Further, a male spouse would give no more than a few minutes to thinking about whether or not they did.

Background Information on Spouses

All but one of the respondents were female, and only one spouse did not reside in the same town or city as the president. Over one-third of all spouses, 34.8% (16), work full-time or part-time in remunerative employment.

The years in which presidents took office at their current institutions ranged from 1967 to 1989 and can be divided into three groups:

Took office during the last 5 years	-	39.0% (18)
Took office from 6 to 10 years ago	-	43.4% (20)
Took office from 11 to 22 years ago	-	17.4% (8)
No response	-	(1)

When asked whether they played active roles in support of their presidents and institutions, 100.0% (27) of the respondents from public institutions and 88.9% (16) from private campuses answered "yes." In answer to a follow-up question that asked how many hours a week were devoted to activities associated with being the spouse of the president, the average was 30 hours per week. Only 4.5% (2) of the spouses, one from a private and one from a public university, indicated they received salaries for serving as active spouses.

On the topic of whether the spouse was interviewed during the presidential interview process, 44.2% (19) indicated they were included in the interview process. The results were almost identical at both private and public institutions. Six of the respondents who said they were interviewed noted that it was done informally. It should be noted that while 44.2% (19) of the spouses said they were part of the interview process, only 15.9% (7) indicated that their boards had ever discussed their expectations of the role of the spouse. Only 10.9% (5) of the respondents had written job descriptions for their roles as presidents' spouses.

Among spouses from both public and private institutions, 19.6% (9) had official titles. The most popular title was associate of the president /chancellor (5).

Background Information on Trustees

The background information section for trustees focused on the length of time each had served on the board and her/his familiarity with the presidential search process. It also asked for some basic information on the president of the institution.

Trustees were asked when they were first appointed or elected to their boards. The range was from 1967 to 1989, and there was a fairly even distribution within this range. Another question asked in what year the trustee was first appointed or elected chair of the board. The results show that 67.7% (23) of the trustees had assumed their leadership positions within the past two years. The remainder were appointed or elected chair between 1970 and 1986.

Since several questions in the body of the survey dealt with the interview process for presidential candidates, trustees were asked how familiar they were with the presidential search processes used by their institutions. The majority of trustees, 85.3% (29), indicated they were familiar with their presidential search processes, while the remainder, 14.7% (5), were somewhat familiar with the processes on their campuses.

More than one-half of the trustees, 57.6% (19), reported that their presidents had been at their universities for five years or less. At the time this study was conducted, almost one-third, 30.3% (19), indicated that their institutions were conducting searches for new presidents.

The Presidential Search Process as It Relates to the Spouse

The questions in this section focused on the presidential search process and asked whether the spouse should be included in the interview process and, if so, how she/he should be accommodated. Among spouses who responded, 44.2% (19) indicated that they were included in the presidential interview process while almost twice as many, 79.5% (35), felt that the spouse should be included in the interview process. Several spouses qualified their answers to this question. The following four qualifications were given: it should be the spouse's choice, the emphasis should be on the process rather than on the interview, the spouse should be included if the trustees expect the spouse to be involved in the university, and the spouse should be included for the sake of the institution as much as the spouse. Nearly all trustees, 93.8% (30), felt that spouses should be included in the presidential interview process.

Respondents who indicated that spouses of presidential candidates should be included in the presidential interview process were asked to complete three additional items. The first item dealt with the spouse's involvement in the interview process. Fully 77.8% (28) of the spouses who responded and 80.0% (24) of the trustees who responded felt that spouses should be informally interviewed during the presidential interview process.

The second item was a series of questions that asked with whom the board should discuss its expectations of the role of the presidential spouse. Most spouses, 86.8% (33), and trustees, 74.2% (23), were in agreement that the discussion should be held with both the presidential candidate and the spouse. Among the pairs of spouses and trustees who responded from the same institutions, all (13) were in agreement that the board should discuss its expectations of the role of the spouse with both the spouse and the presidential candidate.

The third item asked whether the institution should offer to pay the spouse's travel expenses to the candidate's interview. All trustees who responded (30) and 97.3% (36) of the spouses felt that the institution should pay for the travel expenses of the spouse.

Role of the President's Spouse

The Active Role of the Spouse

All trustees (31) and 92.5% (37) of the spouses who responded felt that the presidential spouse should play an active role in support of the president and institution. At the time this study was conducted, 95.6% (43) of the spouses reported that they played active roles vis-a-vis the institutions. In the future, boards may need to negotiate what involvement the spouse will have with the institution. In those cases where the spouse is unwilling or unable to assume an active role, the board may need to hire staff members who will assume some or all of the responsibilities normally associated with the role of the president's spouse.

Defining the Role of the Spouse

Spouses and trustees were asked if the spouse's role, as it relates to the campus, should be clearly defined. Among the respondents, 58.7% (27) of the spouses and 68.8% (22) of the trustees answered "no" to this question. There are several possible reasons for this relatively negative response. Some spouses may have felt that a clearly defined role would limit a spouse's ability to pick and choose which activities to support or it might place time demands above and beyond what the spouse would like to give to the institution. On the one hand, an ambiguous role may give some spouses a sense of freedom, while on the other hand, others may feel frustrated in not knowing what is expected of them. Trustees may not want to define the role because it may appear that they are trying to get "two for the price of one" when they are hiring the president. It also might force them to make decisions on other issues (i.e., compensation, title, benefits, and support). Oftentimes, once expectations are defined and

compensation is addressed, a precedent is established. The question then becomes whether the institution should address the issue of expectations and attendant support based on the desire of each new spouse, or if the requirements for a new president should include the expectations for the role of the spouse.

Spouses and trustees varied in their responses to the question of who should be primarily responsible for defining the role of the presidential spouse. Among spouses, 40.4% (19) felt that the spouse should be primarily responsible for defining the role, while 23.4% (11) felt that it should be defined by both the president and spouse and 21.3% (10) indicated that the president, spouse, and board should be involved in this process.

Among trustees, 39.4% (13) felt that the president should be primarily responsible for defining the role; 24.2% (8) indicated that this should be done by the president and spouse; 15.2% (5) felt that the decision should rest with the spouse; and 9.1% (3) replied that the president, spouse, and board should jointly define the role. Among spouses and trustees from the same institutions, 25 of the 31 pairs did not agree on a response or did not respond to the question.

Written Job Descriptions

Among respondents, 73.9% (34) of the spouses and 93.9% (31) of the trustees felt that there should not be a written job description. This finding is consistent with the earlier finding that most respondents did not feel that the role of the spouse should be clearly defined. Among the 20 pairs of spouses and trustees who responded from the same institutions, 65.5% (19) matched responses and said that there should not be a written job description for the spouse. Again, some spouses qualified their responses and indicated that there should be a job description only if the spouse receives a salary. When this study was conducted, only 10.9% (5) of the spousal respondents had job descriptions for their roles as presidents' spouses.

Employment Status of Active Spouses

If the president's spouse plays an active role, should she/he be considered an employee of the university? The responses to this question showed that the majority of spouses, 58.1% (25), and trustees, 75.0% (24), did not feel that an active spouse should be considered an employee of the university. It should be noted that trustees from private institutions were unanimously opposed to this concept. Among the 28 pairs of spouses and trustees who responded from the same institutions, 42.9% (13) agreed that the spouse who plays an active role should not be considered an employee of the university. This question also received qualified responses that tied employment status to receiving a salary.

Hours Devoted to the Institution

When asked to list the approximate number of hours per week the spouse should devote to the activities associated with being the spouse of the president, the range of responses was from one to 59 hours. Among spouses, there was no consensus on the appropriate number of hours; however, the most frequently listed amount was from 40 to 49 hours, which was indicated by 26.1% (6) of the respondents. Approximately one-half of the spouses did not indicate a specific number of hours a week a spouse should give to the institution. Included in the reasons were: it varies from spouse to spouse and from institution to institution, it depends on the circumstances of the spouse, it should be up to the spouse to determine whether she/he wants to devote time to the institution, it varies from week to week, and only if the spouse receives a salary. When this study was conducted, spouses indicated that they devoted an average of 30.0 hours per week to university activities.

There was more agreement among trustees: 63.6% (7) felt that spouses should work between 10 and 19 hours per week. The average number recommended by trustees was 13.2 hours, compared with the 27.6 hours recommended by spouses.

Salaries for Active Spouses

Respondents were asked if a spouse who plays an active role should be paid a salary. The responses to this item from spouses and trustees were very similar, with 66.7% (26) of the spouses saying "no" and 71.0% (22) of the trustees giving the same response. A cross tabulation of responses from the 25 pairs of spouses and trustees from the same institutions shows that 40.0% (10) of the spouses and trustees agreed that an active spouse should not be paid a salary.

Those who indicated that an active spouse should be paid a salary were asked how much the annual salary should be. Only 10 spouses and one trustee answered the question. Among spouses, the range was from $10,000 to $60,000; however, there was no consensus or majority opinion as to what the exact salary should be. The one trustee who indicated that a salary should be provided to an active spouse felt that $30,000 should be the amount of compensation.

Several spouses qualified their responses, or lack of response, to this item. Among the reasons cited were: it depends on the amount of time devoted to the position; it would depend on the degree of responsibility; and computation of the salary would need to take into account the hours spent doing the job, the spouse's performance level, and the opportunity lost of continuing in her/his profession. One spouse noted that a state law would make it impossible to pay a spouse.

Several trustees indicated they could not give a specific salary recommendation. The comments included the following: the salary would vary with the size of the institution; the board would be open to discuss the possibility of offering a salary; it is optional and negotiated; a salary should not be paid by the institution, but rather it should be paid at the discretion of the president; and it depends on the amount of involvement.

Only 4.5% (2) of the spouses, one from a private and one from a public university, reported that they received salaries for the work they were doing at their universities, while almost one-third of all spouses and trustees who responded felt that a spouse who plays an active role should be paid a salary. It can be concluded that respondents who felt a salary is justified acknowledge that there is some monetary worth to the job an active spouse performs on behalf of the institution.

It is concluded that compensating a spouse who plays an active role vis-a-vis the institution might require the role of the spouse to be more clearly defined. For instance, a spouse may be required to participate in a formal interview with the board, a written job description may need to be developed, formal evaluations may be required, and the spouse may be asked to present formal reports, on a regular basis, to the board.

Supervising the Spouse's Work

Responses to the question of whether the work of the president's spouse should be supervised were treated more or less equally by both spouses and trustees and between public and private institutions. Among spouses, 83.3% (25) did not feel the work of the spouse should be supervised. This opinion was shared by 82.4% (28) of the trustees who responded to this question. A cross tabulation of responses from the 27 pairs of spouses and trustees from the same institutions indicates that 74.1% (20) of such pairs agreed that the work of the spouse should not be supervised. Again, the qualified responses tied supervision to the issue of salary: if the spouse is paid, she/he should be supervised.

Evaluating the Spouse's Work

A related question asked if the spouse's work should be evaluated. Among respondents, 63.4% (26) of the spouses and 64.7% (22) of the trustees did not believe that the work of the spouse should be evaluated. According to several spouses, evaluating the spouse's work should be done only if she/he receives a salary.

Among the 26 pairs of spouses and trustees from the same institutions who responded to the question of whether the spouse's work should be evaluated, 38.5% (10) of the spouses said "yes" while the trustees from the same universities said "no," and 34.6% (9) of spouses and trustees from the same institutions agreed that the work of the spouse should not be evaluated.

Responsibilities of the Spouse

There was consensus between the responses from spouses and trustees when they were asked to list the three most important responsibilities of the spouse of the president. The most frequently cited responsibilities were: supporting the president both personally and professionally, entertaining various constituencies, maintaining the official residence, representing the university, assisting with public relations efforts, and helping to build a sense of community within the university.

Official Titles for Spouses

The notion of whether the board should provide an official title to a presidential spouse who contributes time and effort to the university was rejected by 58.1% (25) of the spouses and 81.8% (27) of the trustees. Among spouses who responded, 19.6% (9) had titles when this study was conducted. Trustees from private universities were unanimously opposed to this idea, while 30.0% (6) of the trustees from public institutions supported it. It should be noted that the University of California system and the University of Wisconsin system have developed policies on presidential spouses that provide for titles. The title in both cases is associate of the president/chancellor.

Among the 28 pairs of spouses and trustees who represented the same institutions, 53.6% (15) agreed that the spouse should not be given a title, while 18.0% (5) agreed that there should be a title.

When asked what title should be provided, respondents most frequently cited associate of the president/chancellor. The second most popular title was assistant to the president/chancellor.

Reports Prepared by Spouse for Board

Should the president's spouse present reports of her/his activities to the board? This question received a negative reply from 91.2% (31) of the trustees who responded. Among the spouses who responded, 64.3% (27) indicated that a spouse should not be expected to present reports of her/his activities to the board. Again, several spouses qualified their answers by indicating that reports should be prepared only if the spouse receives a salary.

Among the 28 pairs of spouses and trustees who responded from the same institutions, 60.7% (17) agreed that the spouse should not be required to present reports of her/his activities to the board.

Liaison between Spouse and Board

Respondents were asked if someone should serve as a liaison between the president's spouse and the board. Trustees were almost evenly divided on this question, with 57.6% (19) saying that there should not be a liaison and 42.4% (14) feeling there should be one. The responses from spouses were almost two to one opposed to having someone serve as a liaison.

Among the 30 pairs of spouses and trustees who responded from the same institutions, 40.0% (12) of the pairs said "no" while 30.0% (9) of the pairs differed in their responses with spouses saying "no" and the trustees saying "yes."

Respondents who indicated that there should be a liaison between the spouse and the board were asked to suggest someone who should serve in that capacity. The top three candidates from both trustees and spouses were identical. In descending order they were: the president, the executive secretary or the board chair, and an officer or member of the board.

Activities of the President's Spouse

Respondents were given a list of activities and were asked to indicate whether they should be "optional," "expected," or "required" of presidential spouses. A summary of the findings is included in Table 1.

Table 1

Activities That Are Viewed as Optional or Expected/Required of Presidential Spouses

Activity	Spouse Responses	Trustee Responses
Faculty interaction	optional	expected or required
Student interaction	optional	optional
Interaction with local government officials	optional	optional
Interaction with state government officials	optional	optional
Interaction with federal government officials	optional	optional
Attend athletic home games	optional	optional
Attend athletic away games	optional	optional
Community involvement	optional	expected or required
Public relations	optional	optional
Assist the president	optional	optional (50%) and expected or required (50%)
Provide tours of the official residence	optional	optional
Oversee renovation of official residence	optional	optional
Cook for guests or arrange for catering	optional	expected or required
Clean house or arrange for cleaning	optional	expected or required
Send out invitations	optional	optional
Prepare a budget	optional	optional
Monitor household budget	optional	optional
Monitor entertainment budget	optional	optional
Maintain guest records	optional	optional
Maintain household inventory	optional	optional
Interact with board of trustees	expected or required	expected or required
Interact with alumni	expected or required	expected or required
Interact with donors & prospective donors	expected or required	expected or required
Attend special events & attend to special visitors	expected or required	expected or required
Maintain the official residence	expected or required	expected or required
Train & supervise staff of official residence	expected or required	expected or required

Most activities were viewed as optional by both spouse and trustee respondents. The only items that spouses indicated should be expected or required of the presidential spouse were: interacting with the board of trustees, interacting with alumni, interacting with donors and prospective donors, attending special events and attending to special visitors, maintaining the official residence, and training and supervising the staff of the official residence. It was not surprising that spouses felt that the spouse should be expected or required to interact with the board of trustees, especially since the president reports to the board. Similarly, it was expected that spouses would feel that maintaining the official residence and training the staff of the residence also should be expected or required since the residence serves as the home of the presidential family, and it would seem that most couples would want to be involved in how their home is maintained.

Special constituencies such as alumni, donors, prospective donors, and special visitors provide important and often necessary support to institutions. Respondents appear to recognize that the

interaction of the spouse with these constituents is important to enhancing the relationship between these constituents and the institution.

Trustees indicated a wider range of activities that should be expected or required of spouses. In addition to the expected or required activities listed by spouses, trustees indicated that the following also should be expected or required: interacting with faculty, community involvement, cooking for guests or arranging for catering, and cleaning the official residence or arranging for cleaning. It should be noted that trustees were split on whether assisting the president should be optional or expected/required. When viewed as a whole, the number of activities trustees felt the spouse should be expected or required to perform would seem to require more than the 13.2 hours per week that trustees indicated the spouse should devote to the institution.

It would appear that respondents felt that the spouse's involvement in certain activities is vital to the campus. It also could be concluded that while some of the functions can be assumed by other staff members, it is important to have the spouse interacting with various constituencies and representing the institution.

Six spouses, three from private institutions and three from public universities, qualified their answers by saying that all activities should be optional unless the spouse is paid a salary. Spouses from public institutions rated more activities as being required than did their counterparts from private universities; however, for the most part, these numbers were very small. The only activity that received a more or less uniform response from all respondents was that the spouse should be required to maintain the official residence.

Among the 12 spouses who indicated that all activities should be optional, three spouses from private universities and four spouses from public institutions added that the spouse should be the one to decide how involved she/he wishes to become. Many went on to say that this should be communicated to the board of trustees in the interview process or early in the tenure of the president.

Institutional Support for the Spouse of the President

Institutional support was divided into two categories: support and benefits. Within each category, the respondent was asked to indicate which of a series of items should be provided to the president's spouse.

Support

The following support services received a minimum of 81.0% affirmative response from both spouses and trustees who responded: a budget for maintenance of the official residence; a budget for furniture and equipment; a budget for cutlery, china, glassware, and linen; a budget for supplies (e.g., cleaning and entertainment); staff assistance to help with entertaining; a clerical staff; a cook or catering service; a housekeeper or housekeeping service; a gardener or gardening service; a maintenance staff or maintenance service; and a budget for entertaining. The four items that received less acceptance by all respondents were: petty cash fund for minor expenses, credit cards for official expenses, use of an institutional car, and travel funds for business without the president. Trustees from public universities gave more positive responses to support services than did their counterparts at private universities. There was overall agreement between the responses from spouses and trustees who represented the same institutions. In a few cases, spouses qualified their responses by stating that these services should be provided to the president, rather than to the spouse.

Benefits

Among pairs of spouses and trustees who responded from the same institutions, more than 60.0% agreed that the following benefits should be provided: campus identification card, library card,

free tuition, parking permit, business travel funds to accompany the president, business travel insurance, conference registration fees, and defense and indemnification for claims resulting from the performance of duties.

There was strong sentiment against providing certain benefits to the spouse. Fifty percent or more of the trustees who responded to this question indicated that the following should not be provided to the spouse: life insurance benefits, worker's compensation, contributions to a retirement fund, clothing allowance, and assistance in finding a job at the institution. One possible explanation for the reluctance on the part of some trustees to provide these benefits is that several of these items generally are provided to employees of the institution, so may imply that the spouse is an employee.

More spouses than trustees felt that life insurance benefits, worker's compensation, and contributions to a retirement fund should be provided to an active spouse. One explanation might be that they felt that these would be a form of monetary compensation without being a salary. The responses from spouses and trustees who represented the same institutions were very similar.

A number of spouses qualified their responses. Three spouses noted that support and benefits should be provided only if the spouse is an employee of the university or plays an active role. Three other spouses noted that these items should be provided to the president and not to the spouse.

The qualified responses from trustees seemed to center on two major issues. The first is that the items listed under the heading of support should be provided to the president. The second qualification was that some benefits should be provided only if the spouse is an employee of the university or only if she/he plays an active role.

DISCUSSION OF FINDINGS

The intent of this study was to determine if there were any trends related to what the role of the presidential spouse should be as perceived by people currently in two positions that can influence that role: namely, the spouse and the chair of the board of trustees. Survey results revealed two major patterns of response regarding defining and communicating the role of the spouse and the type of involvement the spouse should have with the institution.

Defining and Communicating the Role of the Spouse

First, according to both spouses and trustees, the role of the spouse should be discussed informally among the board, the spouse, and the presidential candidate during the presidential interview process, with the spouse actively participating in defining the role. While each of the five previous studies of spouses led to the recommendation that boards of trustees should be more direct in defining and communicating their expectations of the role of the presidential spouse (Clodius & Magrath, 1984; Corbally, 1977; Ostar, 1983, 1986; Ostar & Ryan, 1981), the current study recorded a shift in the burden of defining and communicating what the role should be from the board to the spouse.

Almost 80% (35) of the spousal respondents indicated that the spouse should be part of the interview process, while an even higher percentage of trustee respondents, 93.8% (30), supported this concept. Among spouses and trustees who responded from the same institutions, 67.9% (19) of the pairs agreed that the spouse should be included in the interview process. According to 77.8% (28) of the spouses and 80.0% (24) of the trustees, the spouse should be informally interviewed during the presidential interview process.

These findings support the notion that in most cases the spouse will play some role vis-a-vis the institution, even if it is limited, and that the spouse not only needs to be part of a process that seeks to learn more about the potential presidential couple, but also to learn more about what will be expected of the spouse. An informal interview situation allows the spouse to investigate what is expected of

her/him, and also to communicate what she/he is willing to do for the institution, in a way that does not overemphasize the role of the spouse.

Fully 86.8% (33) of the spouses and 74.2% (25) of the trustees indicated that the board should discuss its expectations of the role of the presidential spouse with both the presidential candidate and the spouse. There were some differences between the responses of spouses and trustees based on the types of institutions they represented. Spouses from public universities and trustees from private institutions tended to support this position more than did spouses from private universities and trustees from public institutions.

Comments from one-third of the spouses supported the concept that a spouse should define her/his relationship to the university. These included:

> I believe the spouse needs to be the one who defines the position.
>
> Each of us has to work out the details [of our involvement with the university] to mesh with our individual personalities.
>
> ...they [activities] should only be expected if [the] spouse agrees and should never be required.
>
> I do not feel that the spouse of the president should be required to perform any activities unless she has agreed in writing to do so.
>
> In my opinion they [activities] should be optional but that is a matter for negotiation up front with the candidate and his/her spouse. If the trustees want to require any of the above [activities] that should be made clear from the start. Then the presidential candidate and his/her spouse can discuss with the board the terms and conditions under which the spouse would agree to do all or some of the above [activities].
>
> I believe the role of the president's spouse should be tailored by each individual spouse to their talents and needs. This should be discussed with the board before the position is offered and accepted.

A few trustees added comments on the spouse's role. One trustee noted: "The [traditional] activities [associated with the spouse] must be done, but it need not be the spouse who does them." This statement may be interpreted to mean that it would be up to the spouse to decide whether she/he would serve as an active spouse and, if she/he chose not to participate in activities, the board would find some way to see that they were accomplished. Another trustee noted:

> It is difficult to generalize about these [activities] when a spouse may or may not be professionally employed and may or may not be a female willing to undertake those duties traditionally expected of a presidential "wife." I believe all of the duties described above can be contracted for and/or performed by others than a spouse, although ideally they would be performed by a spouse. Never do I think a presidential candidate should be penalized in his/her evaluation because of the lack of a spouse or the unwillingness or inability of the spouse to perform these duties.

While it is important for spouses and boards to clarify the role of the spouse, it appears that neither spouses nor trustees want rigid role definitions handed to presidential candidates and their spouses. Both groups seem to want the role more clearly defined, yet it appears that they would prefer doing this together, on an individual basis. It seems that there is a perception that a predefined role would not be flexible and responsive to the needs of individual spouses. This also may account for why 73.9% (34) of the spousal respondents and 93.9% (31) of the trustee respondents did not feel there should be a written job description for the role of the president's spouse. Based on the responses to the

question about which activities the spouse should be involved in, it would seem that spouses want the freedom to determine their own roles, or at least actively to voice their concerns and, perhaps, to negotiate reasonable accommodations.

Another factor that can influence the role a spouse feels she/he should play is whether that person has a career. The current study reported that 34.8% (16) of the spousal respondents had remunerative careers. These respondents were equally divided between having full-time and part-time positions. A board that feels that a president's spouse should devote her/his efforts to entertaining, maintaining an official residence, traveling, interacting with various on-campus and off-campus constituencies, maintaining records, supervising a staff, etc., may need to revise its expectations when it is informed by a spouse that she/he is pursuing a career. Although this study did not inquire whether the spouse had children or other avocational interests apart from the university, these, too, could influence the role of the spouse.

Having the board, the spouse, and the presidential candidate discuss the role and responsibilities of the spouse may become an issue when married female presidents are hired. Would a male spouse be expected to assume the traditional activities of a female spouse without consultation with the board? Although data on such situations are limited due to the small number of female presidents with spouses, the sparse literature on this issue reports that boards have made accommodations to ensure that the traditional responsibilities of the spouse are assumed by other staff members. This, too, would be the case if a president did not have a spouse.

The question really seems to be one of self-determination. While spouse respondents perceive the spouse's most important responsibility to be supporting the president, both personally and professionally, they would like the spouse to be the one to determine how much she/he will support the professional side of the president. Learning of the board's expectations for the spouse in an informal interview session, and discussing the spouse's view of the role at the same time, would allow the spouse and the presidential candidate the opportunity to factor this into a decision about whether the presidential candidate should accept the position, if it is offered. Defining the role of the spouse during the interview process would establish clear expectations of what will be expected of the spouse and what support will be provided to the spouse by the board. This supports Corbally's observation (1977):

> Probably the trustees, having familiarized themselves with the responsibilities which usually accrue to the wife of the president, will prefer to choose some middle road. They will recognize that it is probably impossible for her to remain totally uninvolved and will be ready to discuss with her the extent of her involvement and ways in which they can offer assistance for the responsibilities she accepts. (p. 37)

Type of Involvement: Volunteer or Employee

The majority of spouses, 92.5% (37), and all trustee respondents indicated that the spouse should play an active role in support of the president and institution. Two roles emerged from a review of the response patterns: volunteer and employee. These two roles are more clearly defined in Table 2.

Table 2

The Volunteer Spouse and the Employee Spouse: A Summary of Response Patterns

	Volunteer	Employee
Should there be a written job description?	No	Yes
How many hours should a spouse devote to the institution?	Up to the spouse	Defined based on activities
Should the spouse receive a salary?	No	Yes
Should the spouse be provided with a title?	Depends	Yes
Should the work of the spouse be supervised?	No	Yes
Should the work of the spouse be evaluated?	No	Yes
Should the spouse present reports to the board?	No	Yes
Should someone serve as a liaison between the spouse and the board?	No	Yes
Should the spouse be considered an employee of the institution?	No	Yes

The roles which emerged from the patterns of responses from spouses at both private and public institutions and from trustees at public universities were almost the same. The responses of approximately two-thirds of the respondents can be categorized as defining the role as that of volunteer while the other one-third defined the role as that of an employee (Table 3).

Table 3

Types of Spousal Involvement with the Institution Based on Response Patterns

Patterns of involvement	Spouses			Trustees		
	Private	Public	All	Private	Public	All
Volunteer	68.4 (13)	65.4 (17)	66.7 (30)	100.0 (12)	63.2 (12)	77.4 (24)
Employee	31.6 (6)	34.6 (9)	33.3 (15)	0.0 (0)	36.8 (7)	22.6 (7)
No pattern	-- (1)	-- (1)	-- (2)	-- (1)	-- (2)	-- (3)
Total	100.0 (20)	100.0 (27)	100.0 (47)	100.0 (13)	100.0 (21)	100.0 (34)

The response patterns of trustees from public institutions supported the concept that the spouse's involvement with the university should be either as a volunteer or as an employee. Seven of the 21 trustees at public institutions indicated that an active spouse should be considered an employee of the university, and they supported providing a salary and title to the spouse. These same respondents were unanimously opposed to having the spouse provide reports of her/his activities to the board, but they were divided on whether the spouse's work should be evaluated or supervised. The remainder of the trustee respondents from public universities tended to fall into the same response patterns for the volunteer as described in Table 1; however, like their counterparts at private universities, they felt that the spouse volunteer should be expected or required to participate in some activities.

The response patterns of trustees from private universities tended to categorize the role as solely that of a volunteer. It was the unanimous opinion of trustees from private institutions that there should not be a written job description for the role of the spouse, that a title should not be provided to an active spouse, and that a spouse should not be considered an employee of the institution. The vast majority did not feel that the spouse's work should be evaluated or supervised, or that the spouse should be expected to present reports of her/his activities to the board. Most did not feel that someone should serve as a liaison between the spouse and the board. At the same time, they tended to feel that the spouse should be expected or required to participate in some activities. If a spouse is expected or required to support the institution by actively participating in activities and if she/he is expected to do this without compensation or recognition, the role clearly becomes that of a volunteer. Corbally (1977) stated:

> Many board members would deny any desire to involve her [the spouse] in official duties; in fact, some would be of the opinion that there was no "official" place for her. Others would deny they had any expectations of her of any kind. Those who recognize that she does have some duties to perform might think those duties constitute a fair exchange for other benefits they provide her. (p. 37)

It would appear that trustees at public institutions have a different view of the spouse's role and they seem to be more willing to provide recognition and support for services rendered by the spouse to the institution. This is supported by two findings. First, in regard to the types of support and benefits that should be provided to spouses, trustees from public institutions supported 84.0% of the items at a rate higher than trustees from private universities. Second, two public university systems, those in California and Wisconsin, have adopted policies and procedures on presidential spouses. These policies provide for titles and other perquisites for active spouses.

It is assumed that each role is important to the institution. However, problems may arise when a spouse wishes to assume the role of an employee but the institution is not willing to grant certain concessions, such as a salary and a title, or it may not wish to have the spouse viewed as an employee of the university.

Ideally, the role of the volunteer spouse puts the spouse in control of how she/he will support the institution and the presidency. As a volunteer, the spouse should be able to choose which activities she/he will support and how much time she/he will give to the institution. At the same time, the data show that there should not be other impositions placed on the spouse such as supervising and evaluating her/his work, expecting the spouse to present reports of her/his activities to the board, or requiring the spouse to interact with the board through a liaison. There also should not be a written job description. The volunteer spouse should not be provided with a salary as a means of compensation. A title can be viewed as not required, but it clearly could serve as a form of recognition for the time and effort the spouse gives to the institution.

Corbally (1977) described some difficulties encountered when the spouse is a volunteer or, as she referred to it, an "unofficial" employee:

> Many participants in the study revealed an awareness of the delicacy of their position as an "unofficial" employee of the school. In the performance of the duties the couple have agreed upon, the wife may find her effectiveness depends on her ability to walk a diplomatic tightrope....She has not been "hired" by the board and cannot be "fired" by the board....She has no budget control nor representation, but orders many items which will be paid for with university funds. She is not a "supervisor" in the civil service definition, but must supervise many civil service workers. (p. 61)

One conclusion that can be drawn from this is that, even when the spouse is serving as a volunteer, the role needs to be clearly defined and developed.

The employee spouse, on the other hand, not only should be required to give specific support to the institution, but also should be compensated for the time and effort she/he gives to the institution. The employee spouse may be expected or required to support various activities and to spend a minimum number of hours working for the institution. There probably should be a written job description. The spouse's work should be supervised and evaluated, and someone might be assigned to serve as a liaison between the spouse and the board. The employee spouse also should be provided with a salary and a title to recognize her/his contributions to the institution. Burse (in Clodius & Magrath, 1984) noted that the interview process would take on new dimensions if the spouse were to receive a salary, because the search committee would be focusing on the spouse's talents as well as those of the presidential candidates. (p.134)

In many cases, spouses qualified their responses, which more clearly defined their perception of what the requirements and compensation should be for the volunteer spouse and the employee spouse. For instance, one spouse wrote: "If you throw out the optional aspect of this ambiguous role, it then changes to a position of employment." Another spouse discussed the roles of the volunteer and employee:

> The spouse of the president should not be required to perform any of the above duties unless he/she is paid. Those duties which the spouse elects to perform should be supported by the university with staff, materials, equipment, etc., just as would someone who is being paid. Those spouses who volunteer their time to support the university are giving those specific universities something of value from which the university greatly benefits. The university should recognize volunteer contributions with support services and benefits. Nothing should be required or

> expected unless a job with a salary is available. How can an institution (place of business) expect or require services for no pay? How can marital status be the basis for expecting or requiring services for no pay...?

Another spouse supported this position by noting:

> If I were paid a salary for my "spousal duties" equivalent to that I earn as a ..., then I would feel I should do all the tasks and perform all the duties outlined on the survey. In the absence of compensation, however, the question becomes more difficult. Where does the obligation derive from that creates the "should"? Clearly I should do everything I can to make my husband's personal life smooth and comfortable. But I owe nothing to the institution, any more than I would if my husband worked for G.E.

Several questions arise if a spouse serves as an employees of the institution since she/he acquires the position because of marriage to the president. If a spouse receives a negative evaluation, does this mean that she/he will be fired? If the presidential couple divorces, how will the spouse's employment be terminated? What if, after serving as an employee spouse for several years, the spouse decides she/he wishes to pursue employment outside the institution; will she/he be released from her/his obligations to the institution? While each of these questions poses a challenge, they should not be interpreted to mean that it would be impossible to define a spouse's position if she/he wished to serve as an employee of the university. However, special care and consideration would need to be exercised when defining the terms of employment.

If trustees feel that spouses should be expected or required to fulfill certain responsibilities, it appears that they will need to be willing to do one of two things. Either they will need to respond to the needs of each spouse on a case by case basis, or they will need to include spousal requirements as part of the presidential candidate's qualifications.

SUMMARY

The results from a survey distributed to presidential spouses and chairs of boards of trustees at Association of American Universities institutions revealed two major patterns of response regarding defining and communicating the role of the spouse and the type of involvement the spouse should have with the institution. First, according to both spouses and trustees, the role of the spouse should be discussed informally among the board, the spouse, and the presidential candidate during the presidential interview process, with the spouse actively participating in defining the role. Second, the response patterns support the concept that the spouse's involvement with the university should be either has a volunteer or as an employee. The response patterns of spouses from both private and public universities and the response patterns of trustees from public institutions tended to support both types of involvement, while the response patterns of trustees from private universities tended to categorize the role as that of a volunteer.

In the future, spouses may need to be more assertive in their interactions with trustees during the interview process. A spouse who wishes to preserve her/his autonomy and right to determine her/his own future would be well advised to bring any concerns about the role of the presidential spouse to the board before her/his formal tenure begins with the university. This may not be easy to do during the interview process since a spouse who is unable or unwilling to play an expected role may fear jeopardizing the opportunity for her/his husband or wife to be offered the presidency. Part of the decision related to the role the spouse wishes to assume will have its roots in the marital relationship and what the husband and wife feel is important to both of them as a couple and as individuals.

In the future, trustees may need to be more accommodating to the needs of presidential spouses. A board may be forced to look at the role of the spouse, especially if it seeks to hire an unmarried president, or a female president who has a spouse. In both of these cases, options may need to be

explored to ensure that the traditional responsibilities of the spouse will be assumed by someone else. This also would be the case if a spouse is unwilling or unable to assume an active relationship with the institution. In the event that a spouse wishes to be considered an employee, a board may need to consider how it might compensate her/him for the time and effort given to the university, either by offering the spouse a salary or by providing other forms of recognition and benefits.

The intent of this study was to determine if there were trends related to the role of the presidential spouse. This comment from a spouse summarizes why it is difficult to define the spouse's role:

> I have seen a great many different systems work well or poorly over the years, and find myself unable to say that one approach or another should prevail. This seems to depend very much on the institution in question, on its traditions, on the particular configuration of individuals associated with its administration, its faculty and student body, and on the role of the college or university in the community. With the present trend toward two-career families, moreover, prescriptions for the role of the spouse are even more difficult to formulate, let alone generalize.

At the same time, it appears that there is a growing recognition by trustees of the value of the work performed by the presidential spouse in support of the president and institution.

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APPENDIX

Institution Code Number: _____

SURVEY CONCERNING THE SPOUSE OF THE UNIVERSITY PRESIDENT

The purpose of this survey is to explore what the role of the presidential spouse **should be** as perceived by both the board of trustees and the spouse.

It is important that you answer each question.

A copy of the questionnaire also has been sent to the chair of the Board of Trustees at your institution. Please do not discuss any part of the survey with him/her before you complete and return it.

Anonymity of institution and confidentiality of respondent are assured. Only aggregate data will be presented and no individual institution or person will be identified in the study.

Several terms with special significance are used throughout the study. They are:

Board: The governing board for an institution.

President: The chief executive officer of a university.

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Allow me to thank you in advance for your time and effort.

The survey form and enclosures (if any) should be sent in the envelope provided to:

Patricia A. Justice
Assistant Chancellor
University of Illinois at Urbana-Champaign
601 East John Street
Champaign, Illinois 61820

Should you have any questions, please call Ms. Justice at: 217/333-8834 (Office) or 217/328-1776 (Home)

Section A: The Presidential Search Process as it Relates to the Spouse

The questions in this section seek to determine if the spouse ***should*** *be included in the presidential search process.*

1. Should the spouses of presidential candidates be included in the presidential interview process?.....Yes( )

   No( )

   If "No," please skip to Item 5

2. During the presidential interview process, should the board:

   Invite the spouse to the candidate's interview as an observer?.....Yes( )

   No( )

   Invite the spouse to the candidate's interview and ask questions of him/her?.....Yes( )

   No( )

   Invite the spouse to the candidate's interview and allow him/her to ask questions of the board?.....Yes( )

   No( )

   Hold a formal interview session for the spouse?.....Yes( )

   No( )

   Informally interview the spouse?.....Yes( )

   No( )

   Decline to interview the spouse?.....Yes( )

   No( )

3. During the interview process, should the board discuss its expectations of the role of the presidential spouse with:

   The presidential candidate and the spouse?.....( )

   Only the presidential candidate?.....( )

   Only the spouse?.....( )

   Neither the candidate nor the spouse?.....( )

   If "neither," when should the board discuss with the president and/or spouse the role the spouse would be expected to assume:

   After the position is offered, but before the offer is accepted.....( )

   After the position is accepted, but before the president and his/her spouse arrive on campus.....( )

   After the president and his/her spouse arrive on campus.....( )

   Never. The board would expect that the role, if any, should develop on its own.....( )

   Never. The board has no expectations for the role of the spouse.....( )

4. Should the institution offer to pay the spouse's travel expenses to the candidate's interview?

   Yes, all expenses.....( )

   Yes, part of the expenses.....( )

   No.....( )

Section B: Activities of the President's Spouse

5. *Please indicate whether these activities* ***should*** *be completely optional, generally expected, or required on the part of the president's spouse. Please circle the appropriate response on the scales provided for each of the activities listed in this section.*

	Optional	Expected	Required	Not Applicable
a. Faculty Interaction (e.g., entertain faculty; attend social functions associated with colleges, departments; become active in faculty spouse organizations; etc.)	1	2	3	N/A
b. Student Interaction (e.g., entertain students; help recruit new students; participate in student orientation; speak to student groups; attend banquet & awards ceremonies; etc.)	1	2	3	N/A
c. Board of Trustees Interaction (e.g., entertain trustees; attend board meetings; etc.)	1	2	3	N/A
d. Interaction with Local Government Officials (e.g., entertain local officials; travel to their homes or offices; etc.)	1	2	3	N/A
e. Interaction with State Government Officials (e.g., entertain state officials; travel to their homes or offices; etc.)	1	2	3	N/A
f. Interaction with Federal Government Officials (e.g., entertain federal officials; travel to their homes or offices; etc.)	1	2	3	N/A
g. Alumni Interaction (e.g., entertain alumni; attend alumni reunions and other events; travel to alumni clubs; speak to alumni groups; etc.)	1	2	3	N/A
h. Interaction with Donors and Prospective Donors (e.g., entertain donors or prospective donors; solicit funds; participate in special fund raising events; etc.)	1	2	3	N/A
i. Special Events/Special Visitors (e.g., attend retirement banquets, ground breakings, building dedications, and other "special events;" entertain special guests of the university; participate in or assist with Commencement; etc.)	1	2	3	N/A

Section B (Continued)

	Optional	Expected	Required	Not Applicable
j. Athletics				
1.) Attend home games of athletic teams; entertain guests before or after the games	1	2	3	N/A
2.) Attend away games and post-season bowls and tournaments of athletic teams; entertain guests before or after the game	1	2	3	N/A
k. Community Involvement (e.g., serve on boards of community organizations; attend special events in the community; speak to local groups; entertain local groups; etc.)	1	2	3	N/A
l. Public Relations Work (e.g., appear on radio and TV; write articles; write or design holiday cards or other printed material; give speeches; actively participate in higher education associations; etc.)	1	2	3	N/A
m. Assist the President (e.g., represent the president at events he/she is unable to attend; accept and acknowledge gifts; purchase gifts for visiting dignitaries; accompany the president on official trips; etc.)	1	2	3	N/A
n. Maintain an Official Residence	1	2	3	N/A
Please skip to question "o" if your institution does NOT provide a house or official residence for the President and his/her family.				
1.) Provide tours of the official residence	1	2	3	N/A
2.) Maintain the official residence	1	2	3	N/A
3.) Train and supervise staff (e.g., housekeeper; cook; gardener; etc.)	1	2	3	N/A
4.) Oversee renovation work	1	2	3	N/A
o. Entertain University Guests In His/Her Home				
1.) Cook for guests or arrange for catering	1	2	3	N/A
2.) Clean the house or arrange for house to be cleaned	1	2	3	N/A
3.) Send out invitations	1	2	3	N/A

Section B (Continued)

	Optional	Expected	Required	Not Applicable
p. Budget and Record Keeping				
1.) Prepare an annual budget	1	2	3	N/A
2.) Monitor a budget for household expenses	1	2	3	N/A
3.) Monitor a budget for entertaining expenses	1	2	3	N/A
4.) Maintain guest records	1	2	3	N/A
5.) Maintain a household inventory	1	2	3	N/A

q. Other Activities

Please list any other activities which you feel the spouse of the president should be **required** to perform:

Section C: Role of the President's Spouse

This section contains a series of questions which relate to the presidential spouse and what her/his involvement should be with the campus.

6. Should the spouse play an active role in support of the president and institution?..... Yes( )

No( )

7. Who should be primarily responsible for defining the role of the presidential spouse?

The board..... ( )

The president..... ( )

The spouse of the president..... ( )

Other - Please specify:..... ( )

Some combination of the above - Please specify:..... ( )

_____

_____

8. Should the spouse's role, as it relates to the campus, be clearly defined?..... Yes( )

No( )

9. Should there be a written job description for the role of the president's spouse?..... Yes( )

No( )

10. If the president 's spouse plays an active role, should she/he be considered an employee of the university?..... Yes( )

No ( )

11. Approximately how many hours per week should the spouse of the president devote to the activities associated with being the spouse of the president?

_____ hours per week

12. Should a spouse who plays an active role be paid a salary?..... Yes( )

No ( )

If "Yes," How much should the yearly salary be?

$ _____

13. Should the work of the president's spouse be supervised?..... Yes( )

No( )

14. Should the work of the president's spouse be evaluated?..... Yes( )

No( )

Section C (Continued)

15. What would your board most likely consider to be the three most important responsibilities of the spouse of a president?

    1.) _____

    _____

    2.) _____

    _____

    3.) _____

    _____

16. Should the board provide an official title to presidential spouses who contribute time and effort to the university?.....Yes( )

    No( )

    If "Yes," what official title should be used?

    _____

17. Should the president's spouse present reports of his/her activities to the board?.....Yes( )

    No( )

18. Should someone serve as a liaison between the president's spouse and the board?.....Yes( )

    No( )

    If "Yes," who should serve as the liaison?

    _____

Section D: Institutional Support for the Spouse of the President

19. Please indicate whether your institution **should** provide the following to the spouse of the president:

Support	Yes	No	Not Sure	Not Applicable
Budget for maintenance of the official residence	1	2	3	N/A
Budget for furniture and equipment	1	2	3	N/A
Budget for cutlery, china, glassware, and linens	1	2	3	N/A
Budget for supplies (e.g., cleaning and entertainment)	1	2	3	N/A
Staff assistant(s) to help with entertaining	1	2	3	N/A
Clerical staff	1	2	3	N/A
Cook or catering service	1	2	3	N/A
Housekeeper or housekeeping service	1	2	3	N/A
Gardener or gardening service	1	2	3	N/A
Maintenance staff or maintenance service	1	2	3	N/A
Budget for entertaining	1	2	3	N/A
Petty cash fund for minor expenses	1	2	3	N/A
Credit cards to be used for official expenses	1	2	3	N/A
Use of a car owned by the institution	1	2	3	N/A
Travel funds for business-related travel by the spouse, independent of the president	1	2	3	N/A

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Section D (Continued)

Benefits	Yes	No	Not Sure	Not Applicable
Life insurance benefits	1	2	3	N/A
Worker's compensation	1	2	3	N/A
Contribution to a retirement fund	1	2	3	N/A
Business cards	1	2	3	N/A
Campus identification card	1	2	3	N/A
Library card	1	2	3	N/A
Free tuition	1	2	3	N/A
Parking permit for campus facilities	1	2	3	N/A
Child care allowance	1	2	3	N/A
Clothing allowance	1	2	3	N/A
Travel funds to accompany president on official business trips	1	2	3	N/A
Business travel insurance	1	2	3	N/A
Conference registration fees	1	2	3	N/A
Defense and indemnification for claims resulting from the performance of duties	1	2	3	N/A
Assistance in finding a job at the institution	1	2	3	N/A
Assistance in finding a job in the community	1	2	3	N/A

Please list any other items, benefits, services, or rewards provided to the spouse of your president:

_____ _____ _____ _____

30

Section E: Background Information

The questions in this section seek background information about your role at the institution and some data on your president

20. In what year did your spouse become the president at your current institution?.....19____

21. Which of the following best describes your current marital status?

Married; living with the president.....( )

Married; living in a different city or town.....( )

Separated.....( )

22. Were you interviewed when your spouse was interviewed in the presidential search process for his/her current position?.....Yes( )

No( )

23. Do you have a written job description?.....Yes( )

No( )

24 Did the board ever discuss its expectations of what your role was to be as the president's spouse?.....Yes( )

No( )

25. Do you play an active role in support of the president and institution?.....Yes( )

No( )

If "Yes,"

How many hours a week do you devote to the activities associated with being the spouse of the president?

_____ hours per week

Do you receive a salary for serving as an active president's spouse?.....Yes( )

No( )

26. Do you have an official university title?.....Yes( )

No( )

If "Yes," what is it?

_____

27. Do you have a job for which you are paid a salary? .....Yes( )

No( )

If "Yes," is it: Full time ( )

Part time ( )

What is your job?

_____

Section E (Continued)

28. Would you like to receive a summary of the findings from this study?.....Yes( )

No( )

29. Would you be willing to receive a follow up phone call in the event that some of your responses need clarification, or additional information is needed.....Yes( )

No( )

If "Yes," please call (Name):

_____

_____During the day at:

(area code) _____/_____ - _____

_____During the evening at:

(area code) _____/_____ - _____

30. Please attach any additional information (copies of policies, guidelines, etc.) that have been developed by your institution regarding the role of the presidential spouse.

Thanks again for your time and effort.

Section E: Background Information

The questions in this section seek background information about your role at the institution and some data on your president

20. In what year did your institution last select a president?.....19____

21. Are you currently conducting a search for a new president?.....Yes( )

No( )

22. Which of the following best describes the current marital status of your president?

Married; spouse lives with the president.....( )

Married; spouse lives in a different city or town..... ( )

Single; never married.....( )

Single; never married - member of a religious order.....( )

Separated.....( )

Divorced.....( )

Widowed.....( )

23. In what year were you first named to the board?....19____

24. In what year were you first appointed/elected the chair of your board?.....19____

25. How familiar are you with the presidential selection process used by your institution?

Very familiar.....( )

Somewhat familiar.....( )

Not at all familiar.....( )

26. Have you read any articles or studies on presidential spouses?.....Yes( )

No( )

27. Would you like to receive a summary of the findings from this study?.....Yes( )

No( )

28. Would you be willing to receive a follow up phone call in the event that some of your responses need clarification, or additional information is needed.....Yes( )

No( )

If "Yes," please call (Name):

_____

_____During the day at:

(area code) _____/_____ - _____

_____During the evening at:

(area code) _____/_____ - _____

29. Please attach any additional information (copies of policies, guidelines, etc.) that have been developed by your institution regarding the role of the presidential spouse.

Thanks again for your time and effort.